

## Message Text

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FM SECSTATE WASHDC

TO AMEMBASSY ALGIERS

AMEMBASSY CANBERRA

AMEMBASSY VIENNA

AMEMBASSY BRUSSELS

AMEMBASSY LUXEMBOURG

AMEMBASSY SOFIA

AMEMBASSY OTTAWA

AMEMBASSY PRAGUE

AMEMBASSY COPENHAGEN

AMEMBASSY BONN

AMEMBASSY PARIS

AMEMBASSY BUDAPEST

AMEMBASSY NEW DELHI

AMEMBASSY ROME

AMEMBASSY TOKYO

AMEMBASSY MEXICO

AMEMBASSY RABAT

AMEMBASSY THE HAGUE

AMEMBASSY OSLO

AMEMBASSY LIMA

AMEMBASSY WARSAW

AMEMBASSY PRETORIA

AMEMBASSY MADRID

AMEMBASSY STOCKHOLM

AMEMBASSY TUNIS

AMEMBASSY MOSCOW

AMEMBASSY DUBLIN

AMEMBASSY BELGRADE

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FOL REPEAT OF GENEVA 7019 TO SECSTATE INFO LONDON USUN  
NOV 18

QTE:  
UNCLAS GENEVA 7019

E.O. 11652: N/A  
TAGS: ETRD GATT  
SUBJECT: INTERNATIONAL LEAD AND ZINC STUDY GROUP: REPORT ON 18TH  
SESSION

QM THE ILZSG HELD ITS 18TH SESSION IN GENEVA NOVEMBER  
13-18, PRECEDED BY COMMITTEE AND WORKING GROUP MEETINGS  
UNMARRIED BY NORTH-SOUTH POLEMICS, THE GROUP REVIEWED  
DEVELOPMENTS IN LEAD AND ZINC MARKETS AND CONSIDERED  
PROJECTIONS FOR 1974 AND 1975. THE GROUP COMPLETED WORK ON A  
SPECIAL REPORT ON SECONDARY LEAD AND ZINC AND COMPILED A  
COMPREHENSIVE LIST OF NEW MINE AND SMELTER PROJECTS,  
DISTINGUISHING BETWEEN THOSE FOR WHICH FIRM COMMITMENTS  
HAD BEEN MADE AND THOSE IN PLANNING STAGES.

2. YUROS LAV STATEMENT CONTAINED ENDORSEMENT OF  
DECLARATION OF PRINCIPLES AND PROGRAM OF ACTION OF  
UNGA SIXTH SPECIAL SESSION AND MORE SPECIFIC REFERENCE  
TO NEED FOR INDEXATION, BUT GROUP TOOK ONLY SCANT  
COGNIZANCE IN FINAL REPORT WITHOUT YUGOSLAV PROTEST.  
MEXICO AND PERU STATEMENTS INCLUDED BRIEF REFERENCES TO  
POSSIBLE NEED IN FUTURE OF STABILIZATION MEASURES. CANADA  
AND PERU (AND AUSTRALIA INFORMALLY) COMMENDED US FOR  
QUOTE ORDERLY AND RESPONSIBLE UNQUOTE STOCKPILE DISPOSAL  
POLICIES. AUSTRALIA AND CANADA IN MODERATELY WORDED STATEMENTS  
REGISTERED DISPLEASURE WITH US IMPOSITION OF ANTI-DUMPING  
DUTIES, TO WHICH USDEL MADE EQUALLY MODERATE AND WELL-  
RECEIVED FEJOINDER, DISPOSING OF ISSUE WITHOUT FURTHER DEBATE.

3. THE GROUP ESTIMATED LEAD MINE PRODUCTION IN NON-SOCIALIST  
WORLD TO BE 2,561,000 TONS IN 1974 AND 2,768,000 IN 1975,  
COMPARED TO ACTUAL 2,602,000 IN 1973. (ALL AUANTITIES IN METRIC  
TONS.) LEAD METAL PRODUCTION WAS ESTIMATED AT 3,561,000 FOR  
1974 (65,000 OVER 1973) AND 3,743,000 FOR 1975.  
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4. LEAD METAL CONSUMPTION ESTIMATED AT 3,599,000 TONS FOR  
1974 AND 3,623,000 FOR 1975 COMPARED TO ACTUAL 3,689,000  
IN 1973.

5. ZINC MINE PRODUCTION IN 1974 ESTIMATED AT 10,000 TONS  
OVER 1973 ACTUAL OF 4,528,000 EXPECTED TO RISE  
ANOTHER 240,000 TONS IN 1975 (ABOUT HALF OF WHICH ASCRIBED

TO CANADA AND AUSTRALIA). ZINC METAL PRODUCTION WAS 4,233,000 TONS IN 1973 AND IS FORCAST TO RISE TO 4,374,000 IN 1974 AND RISE FURTHER TO 4,841,000 IN 1975.

6. ZINC METAL CONSUMPTION EXPECTED TO MOVE FROM ACTUAL 4.9 MILLION TONS IN 1973 TO 4,762,000 IN 1974 AND 4,862,000 IN 1975.

7. FOR BOTH METALS 1975 CONSUMPTION ESTIMATES REVEAL A COLLECTIVE OPTIMISM WHICH GROUP RECOGNIZED MUST BE VIEWED WITH CAUTION. US CONSUMPTION DATA FOR BOTH METALS FOR PURPOSE OF THIS EXERCISE WAS SUPPLIED ON APPARENT CONSUMPTION BASIS INSTEAD OF ON AS REPORTED BASIS AS IN PRIOR YEARS.

8. AFTER ACCOUNTING FOR NET TRADE WITH SOCIALIST COUNTRIES AND ANTICIPATED US STOCKPILE DISPOSALS, FORECASTS INDICATE LEAD METAL SUPPLIES WILL EXCEED CONSUMPTION DEMAND BY 137,000 TONS IN 1974 AND 205,000 IN 1975. ZINC ESTIMATES SHOW DEFICIT OF 40,000 TONS IN 1974 AND POTENTIAL SURPLUS OF 225,000 IN 1975.

9. ILZSG ADOPTED BUDGET OF 109,205 FOR 1975 AND AGREED TO RAISE TOTAL ASSESSMENTS TO 100,000 IN 1976, BUT RECOGNIZED THAT INFLATION TRENDS MIGHT REQUIRE EXPANDING BUDGET AND CONTRIBUTIONS BY THAT TIME. GROUP WAS INFORMED OF INTENTION OF SECRETARY-GENERAL JUDD TO RETIRE IN 1975, NECESSITATING SEARCH FOR SUCCESSOR AND POSSIBLE INCREASE IN SALARY ITEM IN BUDGET, AS WELL AS PROVIDING IMMUNITIES AND PRIVILEGES, IF SECRETARIAT IS TO REMAIN IN NEW YORK. (SEPARATE TEL FOLLOWS ON THIS POINT.)

10. GROUP RE-ELECTED MAURICE RODINOV (CANADA) AS CHAIRMAN AND J. PRADO CALZADO (SPAIN) AND Y. YERSHOV (USSR) AS VICE-CHAIRMAN). STANDING COMMITTEE ELECTED UNCLASSIFIED

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M. J. DUX (US) TO NEW POSITION OF VICE-CHAIRMAN, TAKING COGNIZANCE OF FACT THAT CHAIRMAN N. P. JAIN (INDIA) HAD BEEN TRANSFERRED TO NEW DELHI AND DID NOT ATTEND THE SESSION, AND THE LIKELIHOOD THAT JAIN WOULD NOT ATTEND THE NEXT SESSION OF THE STANDING COMMITTEE IN NEW YORK.

11. GROUP TENTATIVELY DECIDED TO HOLD 19TH SESSION IN GENEVA BETWEEN NOVEMBER 3 AND NOVEMBER 12, 1975.

12. DEPARTMENT MAY WISH TO REPEAT THIS REPORT TO OTHER INTERESTED POSTS. DALE UNQTE INGERSOLL

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